



## Roadmap for Washington State Financial and Administrative Policies, Process and Systems

### As-Is Business Process Model Focus Group Contract Management

November 30, 2005 8:00 – 12:00

#### AGENDA

1. Welcome and introductions	8:00	Kathy
2. Project background and update	8:05	Kathy
3. Business process modeling overview <ul style="list-style-type: none"> <li>Objectives for the As-Is focus group are to understand what we do and why</li> <li>Collect enough detail to identify problems with the current policies and process, and opportunities for improvement</li> <li>Modeling methodology will focus on entities, inputs, outputs, events, data and constraints</li> </ul>	8:15	John
4. Your Roles and Responsibilities <ul style="list-style-type: none"> <li>Attend As-Is, Could-Be, and Wrap-Up sessions</li> <li>Provide information about business processes</li> <li>Communicate agency needs</li> <li>Be willing to explore change and standardization</li> <li>Exchange questions/issues/feedback with your agency</li> <li>Review and provide timely feedback on focus group results</li> </ul>	8:25	John
5. Discuss and refine the scope of the contract management process	8:30	Susan
6. Discuss and refine the business objectives for the contract management process	8:40	Susan
7. Review and refine the straw-man process model for contract management <ul style="list-style-type: none"> <li>Do all agencies share these basic objectives, inputs, outputs, and processes?</li> <li>What's unique in your agency and why?</li> <li>What tools are available? What portions of the process do they support?</li> </ul>	8:50	John
BREAK	9:50	
8. Continue refining straw-man process model for contract management	10:00	John
9. Challenges and Opportunities <ul style="list-style-type: none"> <li>What are the challenges with the current process?</li> <li>What opportunities are there for improvement?</li> </ul>	11:30	Susan
10. Next steps <ul style="list-style-type: none"> <li>Review updated As-Is models and best practice research (coming to you soon!)</li> <li>Could-Be session, 12/14 at 1 pm, Point Plaza Training Room</li> <li>Follow-up session, 12/21 at 9 am, Point Plaza Training Room</li> <li>Process Check</li> </ul>	11:50	Kathy



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#### **Definition of Contract**

A legally binding agreement between a minimum of two parties with an exchange of tangible value. The principal purpose is to purchase, lease, or barter property or services for the use and benefit of state government, or its clients, and to firmly define accountability for performance by each party. Includes personal service contracts, purchased service contracts, client service contracts, etc. <sup>1</sup>

All types of agreements, regardless of what they may be called, for the procurement of or disposal of supplies, services or construction. <sup>2</sup>

#### **DRAFT Process Scope**

The process of negotiating terms and conditions of contracts for goods or services, recording awarded contract amount and terms, monitoring actual usage by agencies, and tracking problems reported with specific contracts or vendors. The process also includes evaluating the effectiveness of the contract and vendors in meeting state performance objectives.

#### **DRAFT Business Objectives**

1. Reach agreement between the parties.
2. Protect the interests of the state.
3. Comply with state contract laws and rules.
4. Monitor and measure achievement of contract objectives.

#### **Handouts:**

1. *Roadmap* Business Process Model and Business Initiatives Chart
2. The special *Roadmap* edition of *The Connection*
3. Contract Management As-Is Straw Man Process
4. Model Legend
5. Components of the Business Process
6. Assumptions on Common Process and Agency Variations

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<sup>1</sup> OFM *Key Considerations For State Grants*, 9/23/2005, page 2,  
<http://www.ofm.wa.gov/contracts/icct/stategrantguidance.doc>

<sup>2</sup> GA Washington State Purchasing Manual, revised 10/28/2005, page 11.  
<http://www.ga.wa.gov/pca/Forms/Washington-Purchasing-Manual.doc>